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ABSTRACT

A leader's guide for conducting a workshop on managing bilingual program evaluations is presented as part of the Bilingual Evaluation Technical Assistance (BETA) project. After examining how to organize the workshop, the following aids are presented: a preworkshop preparation checklist, a sample room arrangement diagram, a workshop time schedule, and instructions for conducting the workshop, including the actual script. Management of evaluation is discussed in regard to the following major stages: scheduling the evaluation tasks, estimating staff needs, budgeting for the evaluation, monitoring the evaluation, and reporting the evaluation results. The workshop also provides: background information on the research and development work conducted by the Center for the Study of Evaluation at the University of California, Los Angeles; an overview of the BETA project and the five workshops; an analysis of the major tasks in evaluation management; and an analysis of the major stages in bilingual program development (needs assessment, program planning, program implementation, formative evaluation, and summative evaluation). (SW)

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ED227676

# Bilingual Evaluation Technical Assistance

## Workshop V

## Planning for Management

## Leader's Guide

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Information about CSE and its publications may be obtained by writing to:

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Table of Contents


| | Page |
|---|---|
| How to Organize the Workshop | 1 |
| Pre-Workshop Preparation Checklist | 3 |
| Room Arrangement | 4 |
| Instructions for Using Leader's Manual | 5 |
| Time Schedule | 6 |
| Introduction to the Workshop | 7 |
| Discussion: Managing an Evaluation | 8 |
| Activity #1 - Scheduling | 19 |
| Activity #2 - Staffing | 21 |
| Activity #3 - Budgeting | 22 |
| Activity #4 - Monitoring | 23 |
| Activity #5 - Reporting | 24 |

# HOW TO ORGANIZE THE WORKSHOP

## Recruitment

The BETA workshops were designed for audiences with three levels of involvement with bilingual evaluation. At the most general level, all people involved in bilingual program, both bilingual and monolingual program teachers, students, parents, and community members will find some parts of the materials valuable. A second audience is educators directly involved in bilingual program planning and implementation who are familiar with many of the general principles of curriculum development and testing, but who have no special training in evaluation. The third group for whom the materials were designed is research and evaluation specialists who may not be well-acquainted with the special demands of bilingual program evaluation. Since the concerns of these three audiences are often very disparate, we suggest that you organize workshops to serve each group separately. Thus, workshops will serve one of the following categories of levels of expertise:

G: Workshops for all levels of expertise including parents and community.

S: Teachers, administrators and school site staff with instructional and administrative experience in bilingual programs, but no specialized evaluation training.

R: Evaluators and research staff familiar with design, measurement and implementation procedures used in program evaluation, but unfamiliar with the special demands of bilingual program evaluation.

## Notifying Participants

Remind each workshop participant of the workshop about one week prior to the session. Emphasize that the workshop, unlike many conferences and meetings, will require their active participation. Encourage them to bring with them to the sessions questions and materials from their own programs that are related to bilingual evaluation. Explain that the workshops are designed as working and troubleshooting sessions for their own concerns and the intent is to provide immediate help in planning bilingual evaluations.

## Planning Lunch and Refreshments

To maintain the workshop schedule, it is advisable that the participants receive lunch and refreshments in the workshop room, or in an adjacent room. A pre-arranged lunch menu will avoid the confusion and inevitable delays associated with placing individual lunch orders. If the sessions are to run during normal working hours, fifteen minutes can be spared for coffee breaks. Better yet, have coffee and refreshments available to the participants throughout the session. The latter approach seems to work better, if the participants are told politely that they should not spend excessive time around the coffee pot during the session.

## Pre-Workshop Preparation Checklist

Use the checklist below to ensure that the proper materials are obtained for conducting the workshop:

The following items are the responsibility of the Workshop Leader:

_____Seating and workspace for workshop participants

_____A table for the Leader's materials and Overhead Projector

_____A blackboard for summarizing discussion activities

_____A room large enough to hold the required worktables and chairs for participants.

_____A workshop location that has lunch and snack facilities so that participants can eat together and take breaks with a minimum of time spent in travel.

The following items are supplied by the Workshop Distributor:

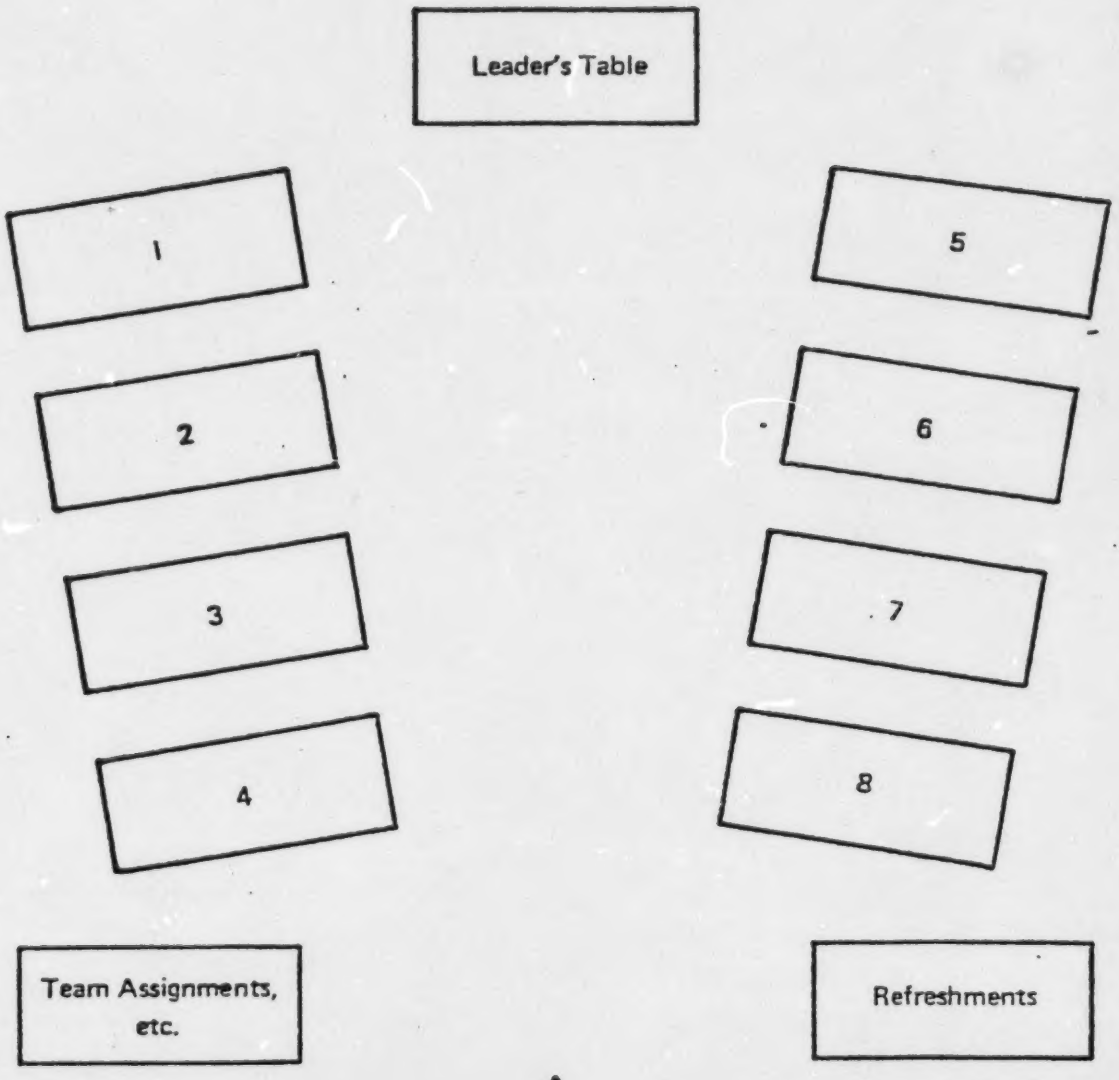
_____Leader's manual

_____One Workshop Text for each participant

_____One Participant's Handbook for each participant

## Room Arrangement

A sample room arrangement for 24 participants (eight teams) appears below.



## INSTRUCTIONS FOR USING THE LEADER'S MANUAL

This Manual describes the workshop, presents information necessary to provide instruction leading to workshop exercises and provides step by step instructions for conducting the workshop.

The Leader should become familiar with all workshop materials, Guide, Text, and Participant's Handbook, before attempting to conduct the workshop.

The major goal of the Bilingual Evaluation Technical Assistance materials is to provide practitioners with practice in planning bilingual evaluations and with an overview of the issues that must be addressed during such evaluations.

THE WORKSHOP LEADER SHOULD READ THE ENTIRE MANUAL BEFORE CONDUCTING THE WORKSHOP.

### The Script, Extracts, and Directions to Leader

Each page of the Leader's Manual is divided into two parts. The left-hand portion of the page contains a blocked-off instructional "script." The following is an example of this script, which is read by the Workshop Leader:

Script

| |
|---|
| The purpose of this workshop is to introduce you to the basic concepts in bilingual evaluation. |

## GENERAL WORKSHOP SCHEDULE

This workshop has been designed to accomplish its objectives within four hours of instruction. Below you will find a general time schedule and the times allotted for each activity. Please detach this page for use during instruction.

| Morning Workshop | Time | Activity |
|---|---|---|
| | 8:00-8:20 AM | Coffee, introductions and general announcements |
| | 8:20-9:00 | Planning for Management: introductory remarks |
| | 9:00-9:20 | Revising the program proposal |
| | 9:20-10:00 | Exercise #1: Scheduling |
| | 10:00 | Break |
| | 10:30-11:10 | Exercise #2: Staffing |
| | 11:10-11:50 | Exercise #3: Budgeting |
| | 11:50 | Lunch |
| Afternoon Workshop | | |
| | 1:00-1:40 PM | Exercise #4: Monitoring |
| | 1:40-2:10 | Exercise #5: Reporting |
| | 2:10-2:45 | Discussion |
| | 2:45-3:00 | Participants' evaluation of Workshop V |

If the Leader is unsure of the content of a workshop or with certain segments of it, she/he should adhere to the script. When scripted material is familiar to the Leader, she/he may wish to refer only to the extracts for guidance. These extracts appear on the right hand side of the script.

| Script | Extract |
| --- | --- |
| ...a design is a strategy which dictates from whom evaluation information will be collected, with what measuring device, and when data collection will occur.. | Design Defined |

Directions to the Leader consist of materials which appear between blocks of script. These directions may refer to such things as points the Leader should discuss, administrative materials, or how to organize an activity.

| Script | Extract |
| --- | --- |
| You will have five minutes to read the materials in this section. Do not go on to the next section until I ask you to. | Background Information |

(Directions) When the participants have read the section, answer any general or procedural questions based on the materials. After any discussion, go on to say:

In this session we'll be working on how to go about planning for the management of a bilingual program evaluation.

INTRODUCTION

Let me begin by telling you a bit about the Center, CSE, and the project that developed the materials we'll be using in this session.

First, CSE--The Center for the Study of Evaluation at UCLA. Since 1966, CSE has been doing research and development in the areas of testing and evaluation. At the present time, there are two major programs at CSE--one dealing with testing concerns, and the other with issues in evaluation. In each program there are two projects; one looks at the present practices and uses of information, and the other looks at issues that might lead to future improvement in practice and use of information.

CSE

Second, the project from previous work at CSE that developed these materials. That project is called BETA--Bilingual Evaluation Technical Assistance Project.

BETA

BETA has developed a series of workshops, like this one, to give people some initial training in bilingual program evaluation. The workshops were developed from two different perspectives: (1) they take into account federal and state requirements that need to be considered by bilingual program evaluators, and (2) they try to meet the information needs of

practitioners at various levels of involvement in bilingual programs.

BETA workshops reflect beliefs that: (1) evaluation is designed to meet different kinds of information needs; (2) evaluation is often a team effort that needs constant communication between members of the evaluation team, decisions makers, and the staff affected by the evaluation or its findings; (3) evaluation's principal goal is to gather information useful for program inprovement; and (4) evaluation should rely on systematic data collection from a variety of different sources.

BETA OUTLOOK ON EVALUATION

BETA workshops are intended on the one hand for teachers, administrators, and other school staff with experience in bilingual education but who may have little formal training in testing and evaluation, and on the other hand for evaluation and research people familiar with evaluation procedures but who are perhaps less familiar with the special needs of bilingual programs.

BETA has five workshops, each providing about four hours of training. These five workshops cover the topics of understanding the bilingual program, evaluation design, testing and assessment, implementation evaluation, and evaluation management. Let me take a minute to tell you a little about each of these workshops.

REVIEW OF BETA WORKSHOPS

Workshop I is an Orientation to Bilingual evaluation. It defines a particular approach to evaluation, gives the historical and legislative background to evaluation, covers the many ways bilingual programs can differ, gives a broad picture of the problems in testing and design, and offers broad suggestions for bilingual program evaluation. These areas are covered in more detail in the other four workshops. For example,

OVERVIEW

Workshop II deals with Planning the Evaluation Design. It introduces the basic elements of evaluation design--such as developing evaluation questions, deciding what parts of the program to examine, selecting measures, and planning data analysis. It covers thirteen possible evaluation designs.

DESIGN

Workshop III deals with Planning for Student Assessment. It looks at one particular concern in evaluation design--instruments to measure what the program is doing. For example, it talks about the purposes of testing, the possible skills to be tested, and deciding which kinds of tests are most appropriate.

ASSESSMENT

Workshop IV looks at Planning for Implementation Evaluation. This workshop is a partner to the units on design and assessment. It covers ways to describe and doucment how the bilingual program was implemented.

IMPLEMENTATION EVALUATION

MANAGEMENT

Workshop V--the unit we'll be working on today--is concerned with Evaluation Management. It gives a breakdown of the major jobs involved in the management of the evaluation process as well as practice exercises on these jobs. These jobs consist of scheduling, staffing, budgeting, monitoring, and reporting.

These are the major training concerns of BETA. Do you have any questions about CSE, BETA, or the workshops before we go on?

ANSWER ANY GENERAL OR PROCEDURAL QUESTIONS, THEN SAY:

INTRODUCTION TO EVALUATION MANAGEMENT

The textual materials you have on planning for evaluation management consist of some background information on how to use the materials, followed by reading sections that cover Introduction to Planning; Scheduling; Staffing; Budgeting; Monitoring; and Reporting. As far as readings go, we'll only be using those sections that are necessary to today's training. The rest are for your future reference.

The information on how to use the materials is on pages to . The sections that correspond to the five actual management tasks are presented as follows:

Scheduling is on pages to

Staffing is on pages to

Budgeting is on pages to

Monitoring is on pages to

Reporting is on pages to

The other materials you have are the workshop exercises and activities that go with these five management tasks.

I'd like you to take about five minutes now to skim through the materials and get a feel for the range of topics and problems covered. All I'd like you to do at this point is to take a look at the broad section headings, and then look at the issues suggested by the side headings on each page. Don't go through the section entitled Activities: Planning for Management. We'll be using these materials later in the session.

AFTER ABOUT FIVE MINUTES, SAY:

Okay. Now I'd like to spend just a few minutes talking about planning for evaluation management. Since evaluation is so complex, it often needs a team effort. The many people

MAJOR TASKS IN EVALUATION MANAGEMENT

involved in doing a good evaluation, the many jobs involved in doing a good evaluation, demands that the evaluation be carefully planned, organized, and managed.

BETA sees managing a bilingual program evaluation as consisting of five major stages.

First of all: Scheduling the evaluation tasks. This will consist of activities like deciding what the sample of students will be, selecting or developing tests, data collection, and data analysis.

Second: Estimating staff needs. This stage involves deciding on the kind of staff needed to do the jobs and the time needed to do each job.

Third: Budgeting for the evaluation. In this stage, the manager plans the budget for the evaluation, including costs of staff, equipment, and "hidden costs".

Fourth: Monitoring the evaluation. This stage will involve keeping people and tasks on the projected timeline, providing staff with necessary support and feedback, re-allocating resources on the basis of unanticipated problems.

And fifth: Reporting the evaluation results. This job involves getting information to the right people, at the right time, and in the most effevtive format.

These are the basic steps in evaluation management. But what do we mean by evaluation--the thing we're going to manage?

Beta sees evaluation as the process of selecting, collecting, and interpreting information for the purpose of keeping various audiences informed about a program. Usually these audiences will use the information to make decisions. And the kinds of decisions they'll make about a bilingual program depends on the stage of development of the program. For example, a bilingual program can be seen as taking place in four phases:

MAJOR STAGES IN PROGRAM DEVELOPMENT

First, Needs assessment: During needs assessment, the need for the program is established. This involves assessing students to see the range of English language proficiencies that exist and using this information to determine the most appropriate kind of bilingual program to meet students' needs.

NEEDS ASSESSMENT

Second, Program planning: Here teachers, parents and other community members, curriculum experts, and others will plan a program to meet the goals determined by the needs assessment. Plans should also be laid at this time for the evaluation design, measures to be used, and means of analysis and reporting. In this phase, plans for managing the evaluation should also be developed.

PROGRAM PLANNING

These first two phases are concerned with establishing the program and its goals. A need assessment sets goal priorities; program planning describes the program to reach these goals. This approach makes one basic prescription about how an evaluation should proceed: it should address the goals and

PROGRAM IMPLEMENTATION

processes of the particular program being evaluated. So the evaluator, should begin by looking at the goals and processes of the particular bilingual program and design an evaluation appropriate to that set of goals and program processes. In addition, to making sure that the information gathered will be useful, both for people in the program and for audiences external to the progrm the evaluator should also plan to describe and document what the program looks like while it is in operation.

Third, Formative evaluation: Formative evaluation involves collecting and sharing information for program improvement. While a program is being installed, the formative evaluator tries to provide the program planners and staff with implementation information to help adjust it to the situation and improve it. Eventually, of course, people will want to know how good the program is, or whether or not to continue with it. But these questions can't be answered right away. They must wait for a summative evaluation that asks about the overall value and effect of a program.

FORMATIVE EVALUATION

While the program is in the developmental stage, the evaluator tries to provide a wide range of program implementation information. This information can be used to decide if the program needs to be modified from the original intentions and to make sure that students are making progress. This

kind of information will be used to modify and improve the program.

Fourthly, Summative evaluation: Summative evaluation looks at the total impact of the program. Only when a program has passed its developmental stage and is functioning as intended, can it be summarily described and perhaps judged. This summary evaluation, the kind of evaluation most often conducted, includes a description of what the program looked like and an estimation of its effect on student outcomes.

SUMMATIVE EVALUATION

Implicit in these four phases of program development and evaluation is the notion of program documentation. Documentation of a bilingual program, which unfortunately doesn't happen too often, is critical. It adds to the evaluation component an element that fully describes the bilingual practices followed in the program, and those events and processes which interacted to achieve outcomes. This kind of documentation should be in a form that describes all the crucial features of the program. If worthwhile results are found in a program, the program may be worth maintaining both to test its effects in the future and to allow other people to judge the relevance of the program in another setting. So simple statements of outcome and estimation of effect are not in themselves sufficient to fully demonstrate program achievements. What is needed is a thorough description which, along with statements

IMPORTANCE OF PROGRAM DOCUMENTATION

of outcome will document the interactions of process and events that helped make the program what it is and what it accomplished.

This approach to evaluation considers a broad range of important concerns: it covers context characteristics such as class size, school and district characteristics, and the time frame of the program; it looks at student characteristics such as age, differing linguistic backgrounds, ability, and attitudes; it deals with program outcomes that include both anticipated and unanticipated effects. It focuses data collection where program effects are most likely to occur; it involves a wide variety of information, both process and outcome. Above all, it attempts to provide credible and useful information for a broad range of educational decisions.

And credibility and usefulness are what a good evaluation is all about. To build in credibility and usefulness, the evaluation needs a good management system. And that management system, as I mentioned, will involve careful scheduling, staffing, budgeting, monitoring, and reporting.

So that's the approach to evaluation we'll keep in mind when we go through the exercises in management, and these exercises will cover the five stages I just mentioned.

Do you have any questions before we go on?

ANSWER ANY GENERAL OR PROCEDURAL QUESTIONS, THEN SAY:

| | |
|---|---|
| Now let me tell you how we'll spend the rest of our time in the session. I mentioned that we won't be doing a lot of reading. But before we do each exercise, I will refer you to a few pages from the reading text that you'll need to go over before you start the exercise. Then we'll do the exercise, have a discussion session on your experiences in the exercise, and then go on to the next topic. | REVIEW OF NEXT WORKSHOP ACTIVITIES |
| Okay. Before we get into the first exercise, I'd like you to turn to the readings and look at the section on "Reviewing the Program Plan" on pages to , and then go to the first section on the actual job of evaluation management, that is, "scheduling". The scheduling text is on pages to . You should be able to go over these materials in about ten minutes. | REVIEWING THE PROGRAM PLAN |

AFTER ABOUT TEN MINUTES, OR WHEN EVERYONE HAS FINISHED READING, ASK FOR ANY QUESTIONS, THEN SAY:

| |
|---|
| Okay. So far we've covered the importance of reviewing the program plan or proposal to get answers to questions like what regulations the program works under, results of any needs assessment, the point of view of people involved in or affected by the program, its philosophy, goals, and objectives, and |

the context the program operates in. We do this to find out everything we can about the program so that we'll plan on evaluation that's appropriate to that particular program.

Now for managing that evaluation. The first step is to think about scheduling; about developing a timeline that identifies the evaluation jobs to be done, the number of months the program will run, and when each specific task will start and end.

SCHEDULING

Now let's put these notions into practice. If you'll turn to the "activities" materials, you'll find the first exercise, on scheduling, on pages to . This exercise, like all the others, consists of a page of directions followed by a worksheet to use in doing the steps of the exercise.

EXERCISE 1

SCHEDULING

What I'd like you to do is this. Working as a team, first decide on the bilingual program that's going to provide the focus for your evaluation management activities. You can do one of the following options:

<u>One</u>: if your team all works in the same bilingual program, imagine that it's the first week in July. School's out and your team is going to manage the program's evaluation during the next school year. Using your combined knowledge about the program you work in, plan its evaluation management, beginning with scheduling and timeline, on the basis of what you've just read.

OPTION 1

Two: if you team represents more than one bilingual program, discuss them as a team, and then pick one to be the focus of your exercises. You might pick the program on the basis of how much a team member knows about the program, or because it has some interesting features, and so forth. Once you've decided on the program that's going to provide the focus, again think of July, and that your team is going to be responsible for managing the program evaluation. OPTION 2

Three: if you don't work on a bilingual program, or if you do but your team can't decide which program to use, you can (a) each join a different team and work with that group, (b) work independently on this exercise and the others that follow. My suggestion would be to join other teams. OPTION 3

Anyway, start discussing the options with your team members. When you've made your decision, go to the scheduling exercise, read the directions, and begin. You'll have 20 minutes for this exercise.

AFTER 20 MINUTES, OR WHEN EVERYONE HAS FINISHED, HAVE TEAMS DISCUSS THE KINDS OF ACTIVITIES THEY SCHEDULED AND THE KIND OF TIMELINE THEY DEVELOPED. ANSWER ANY QUESTIONS, THEN SAY:

All right. Now let's turn to stage two--staffing. I'd STAFFING

like you to read the short section in the readings on staffing, pages to . Take about minutes to go over that section.

AFTER ABOUT MINUTES, OR WHEN EVERYONE HAS FINISHED READING, ASK FOR ANY QUESTIONS, THEN SAY:

In staffing, we need to think about what kind of evaluation is needed--in house, on site, or external--and the other staff necessary to get the job done--clerical staff, test administrators, and so forth. When you've decided on <u>who</u> you need, then you have to decide the <u>time</u> needed for the designated people to do the job. This will involve examining the tasks you scheduled, breaking them down into specific sub-tasks if necessary, who will do each task or sub-task, and in how much time. That's what the next exercise is all about. Keeping your first worksheet handy since you'll be referring to it and the program it represents, turn to exercise 2 on staffing on pages to in the activities section. As in the first exercise, read the directions page, turn to the next worksheet, and apply the information you just read in doing the exercise. You'll have about 20 minutes to do the job.

EXERCISE 2

STAFFING

AFTER 20 MINUTES, OR WHEN EVERYONE HAS FINISHED, HAVE TEAMS DISCUSS THE STAFFING AND TIME PROJECTIONS THEY MADE. ANSWER ANY QUESTIONS, THEN SAY:

BUDGETING

The next job in evaluation management is the budget. Budget items can consist of personnel salary and benefits, consultants, travel, test scoring, supplies, telephone, etc. These topics are covered in the next reading section. It's a long section but you only need to read pages to for the exercise coming up. The remainder of the reading is for your future reference. Take about minutes now to read pages to .

AFTER MINUTES, OR WHEN EVERYONE HAS FINISHED READING, SAY:

EXERCISE 3

Okay. Budgeting is a tricky business and it's not something we're all familiar with. Because of that, in the exercise on budgeting you have two choices. One, based on what you've already developed in the first two exercises for your program, plan an appropriate budget. Or two, you can plan a budget for the simulated example that was provided on page in the text. The exercise coming up has specific directions for both options.

OPTION 1

OPTION 2

The preferable decision would be to go with option one--to develop the evaluation budget for your own program. Discuss the option as a team, make your decision, then read the appropriate directions and begin on the next worksheet. You'll have 20 minutes for this exercise.

AFTER 20 MINUTES, DO THE FOLLOWING. ASK IF ANY TEAM DID OPTION 2--THE SIMULATION OPTION. IF ANY/ALL TEAMS DID, HAVE THEM DISCUSS THE DECISIONS THEY MADE ABOUT DOING THE FULL EVALUATION WITH THE MONEY AVAILABLE. IF ANY/ALL TEAMS DID OPTION 1--BUDGET FOR THEIR OWN PROGRAM--HAVE TEAMS REVIEW THEIR BUDGET AND THE ASSUMPTIONS MADE IN THE CALCULATIONS. COMPARE AND CONTRAST THE WORK TO BE DONE WITH THE DOLLARS OF COST, ESPECIALLY FOR THE HIGHEST AND LOWEST BUDGETS PREPARED. ASK IF ANY TEAMS HAD TIME TO DO STEP 7--CUTTING 15 PERCENT FROM THE OVERALL BUDGET. IF SO, DISCUSS THE KIND OF CUTS MADE AND THE TRADE-OFFS THIS INVOLVED, THEN SAY:

| | |
|---|---|
| Now let's go on to the fourth step in evaluation management--monitoring. The reading section on monitoring is short, so I'd like you to turn to the readings now and go over that section, pages to in the text. Take about minutes to read the section. | MONITORING |

AFTER MINUTES, OR WHEN EVERYONE HAS FINISHED, SAY:

| | |
|---|---|
| In the monitoring stage, we're concerned with the use of resources--of time, of money, of people. We want to set up criteria for judging performance; we need to think of the best ways of monitoring the job while it's being done, <u>not</u> waiting until after it's finished; we have to come up with the most constructive ways of providing communication and feedback to staff to keep things on target. Some of the ways you might these things are suggested in the next exercise. In this exercise you'll be using worksheets from previous exercises | EXERCISE AND MONITORING |

again, and planning the monitoring system for yur own program evaluation. That exercise is on pages to in the activities. Turn to that exercise now, read the directions, and begin. Again you'll have about 20 minutes.

AFTER 20 MINUTES, OR WHEN EVERYONE HAS FINISHED, HAVE TEAMS DISCUSS THEIR MONITORING PLANS, ANSWER ANY QUESTION, THEN SAY:

REPORTING

And now the fifth and final job in evaluation management --reporting. Again the reading section is short, two or three pages. I'd like you to read the text; after the text there are two long figures that amplify issues raised in the text, but they are mostly for your future reference. So take minutes now to read the text, and maybe skim the figures just to get a sense of the points covered.

AFTER MINUTES, OR WHEN EVERYONE HAS FINISHED, SAY:

EXERCISE 5
REPORTING

The next, and final, exercise coming up gives you some basic steps to think about in reporting. It deals with audience identification; determining their information needs; when they'll need the information; what information they'd find credible; the best ways to format the report; and criteria for judging its effectiveness. Again using the information

about your program evaluation you've already generated, turn to the exercise on page  in the activities, read the directions, and begin. Again, you have 20 minutes to do the exercise.

AFTER 20 MINUTES, OR WHEN EVERYONE HAS FINISHED, HAVE TEAM DISCUSS THEIR REPORTING PLANS, ANSWER ANY QUESTIONS, THEN SAY:

That exercise ends the formal part of the workshop. obviously, we've only had a short amount of time to cover evaluation management and its concerns for scheduling, staffing, budgeting, monitoring, and reporting. But you're taking all the materials home, readings and exercise, and hopefully you'll spend more time at your leisure going over them.

I'd just like to say that good management is critical to good evaluation--whether you follow BETA's approach to evaluation or any other, for that matter. If you're interested in what the evaluation looks like as opposed to its management, maybe we'll work again on design, assessment, implementation, and so forth.

Do you have any final questions or points you'd like to raise before we finish?

AFTER X MINUTES OF DISCUSSION SAY:

Before we close, I will pass out participant evaluation form of this workshop. Please help us to improve the workshop by taking a few minutes to give us your evaluation of the workshop.

PARTICIPANT EVALUATION